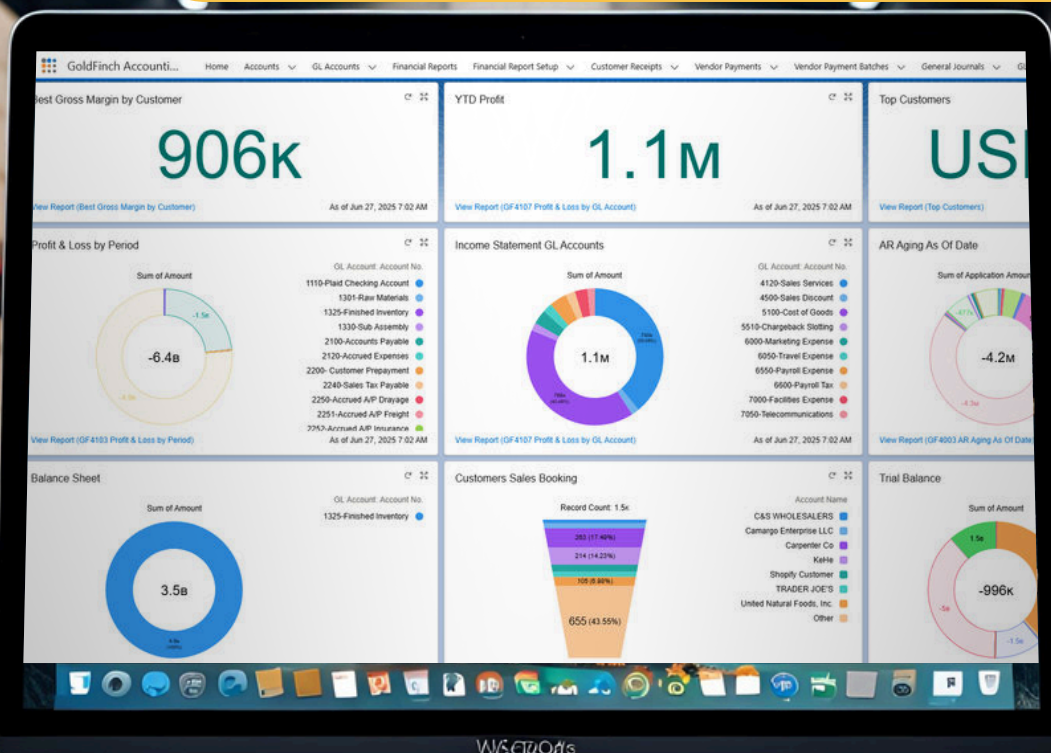


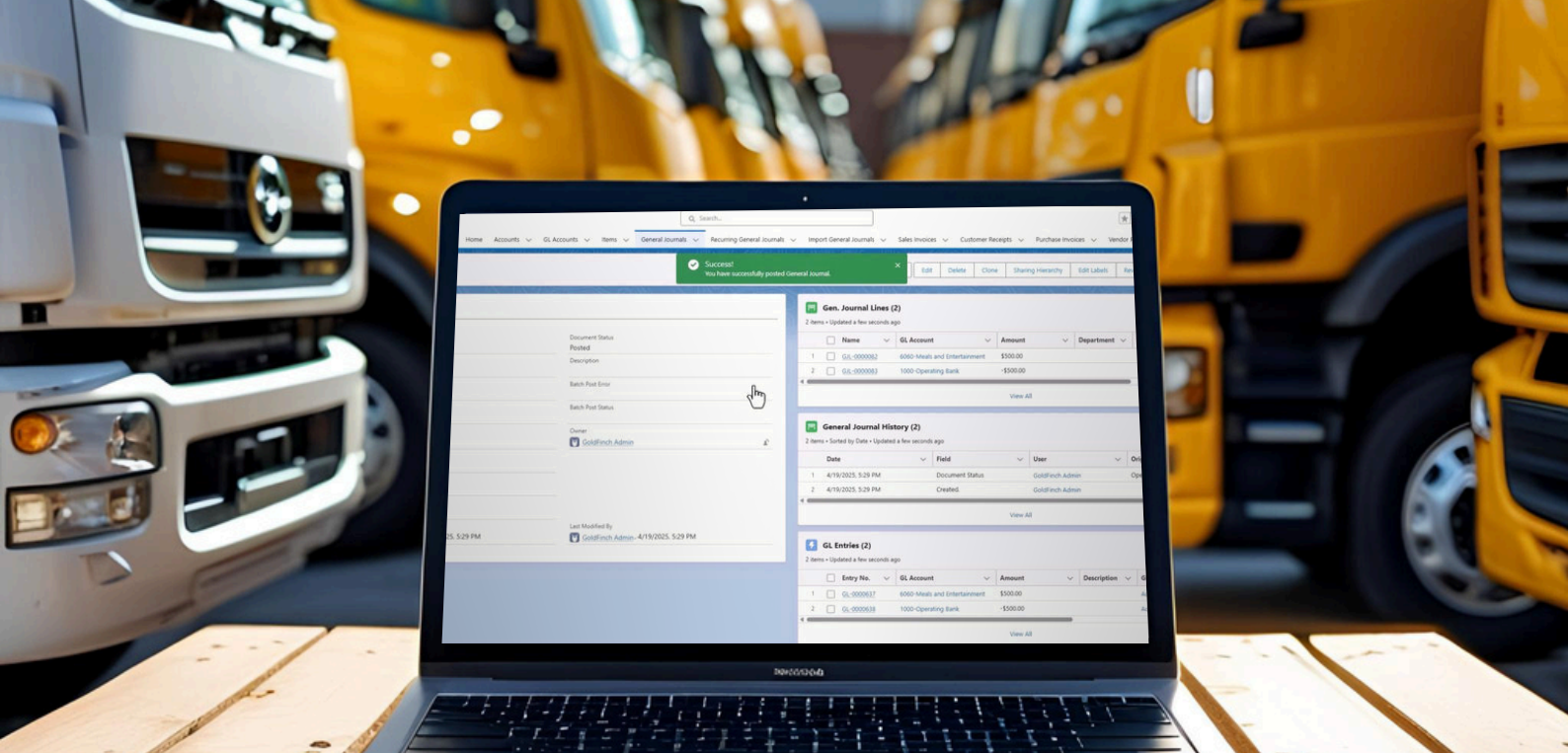
GOLDFINCH ACCOUNTING

salesforce

Full-featured financial management for project-based, service-oriented, and multi-entity businesses—built by CPAs

**POWERFUL, TRANSPARENT ACCOUNTING—
100% NATIVE TO SALESFORCE**





THE GOLD STANDARD IN NATIVE SALESFORCE ACCOUNTING

A full-featured, CPA-designed accounting solution built 100% natively on Salesforce—trusted by finance teams managing projects, global entities, and complex operations.

- **100% Salesforce Native** – No syncs, connectors, or middleware
- **All-in-One Financial Management** – General ledger, AP/AR, banking, fixed assets, project billing, subscriptions, commissions, and more—all included
- **Real-Time Visibility** – Instant access to transactions, cash positions, and performance dashboards—across every dimension
- **Global-Ready Accounting** – Multi-currency & multi-ledger accounting
- **Flexible, Auditable Workflows** – Approval flows, posting rules, and audit trails help you stay in control and compliant
- **No Hidden Fees** – One simple, predictable price gives you access to the complete feature set
- **White-Glove Support** – Backed by CPA-grade support and implementation

AICPA-aligned and Salesforce Security Certified.



GOLDFINCHCLOUDSOLUTIONS.COM

FEATURE HIGHLIGHTS

ONE PLATFORM. ONE DATA MODEL. ONE SOURCE OF TRUTH.



SMART GENERAL LEDGER

Real-time posting, multi-segment chart of accounts, journal workflows, intercompany consolidation, and audit-ready logs with custom GL rules.



ACCOUNTS PAYABLE

Vendor management, invoice approvals, 3-way match (PO → Receipt → Invoice), batch payments, 1099 reporting, and aging analysis—all designed for timely, accurate payments.



ACCOUNTS RECEIVABLE

Sales invoicing, subscription billing, deposits, dunning workflows, and automated payment matching to accelerate cash and manage customer balances with confidence.



BANKING & CASH MANAGEMENT

Live cash visibility, AI-powered bank reconciliation, secure Plaid feeds, positive pay support, and internal fund transfers for complete cash control.



MULTI-CURRENCY & GLOBAL ACCOUNTING

Real-time FX sync, multi-currency GL, AP, AR, and banking, with revaluation and gain/loss tracking built for global financial operations.



FIXED ASSET MANAGEMENT

Track assets by department, automate straight-line depreciation, and maintain full audit trails and monthly journal entries.



FINANCIAL REPORTING & ANALYTICS

Balance Sheet, P&L, and Trial Balance reporting with dashboards, drill-through, budget vs. actuals, BI tool integration, and WIP visibility.



CUSTOMER MANAGEMENT

Full customer history, credit limits, payment terms, and communication logs—all fully integrated with Salesforce CRM and custom objects.



EXPENSE MANAGEMENT

Employee expense reports with mobile entry, policy controls, approval workflows, multi-currency support, and audit-ready logs.



PURCHASE REQUISITION

Employee-driven requests, role-based approvals, and budget validation—streamlining procurement from requisition to PO.



SUBSCRIPTION MANAGEMENT

Automated billing for recurring services, deferred revenue recognition, and support for renewals, upgrades, and contract changes.



COMMISSION MANAGEMENT

Configurable commission rules, multi-tier support, approval flows, and payout visibility to automate incentive programs.



PROJECT SETUP & CONFIGURATION

Template-driven project creation with support for Fixed Fee, T&M, and Cost Plus billing models—fully multi-currency and multi-ledger enabled.



PROJECT BILLING & REVENUE RECOGNITION

Milestone billing, % complete and T&M invoicing, fixed fee schedules, and deferred revenue recognition with full GL integration.



PROJECT BUDGETING & COST CONTROL

Track budgets by phase or category, monitor labor and material costs in real time, and forecast margins with confidence.



TASK & TIMELINE MANAGEMENT

Define project tasks with deadlines and dependencies, assign priorities, and visualize progress with timeline views and Gantt charts.



PROJECT REPORTING & DASHBOARDS

Dashboards for profitability, WIP summaries, milestone tracking, backlog, and utilization—all built for real-time insight.



SEAMLESS INTEGRATIONS

Prebuilt connections for Stripe, Plaid, Avalara, Global Payments, payroll systems, Salesforce CRM and CPQ—plus full API access for custom integration.



REQUEST YOUR CUSTOM DEMO
TO SEE GOLDFINCH ACCOUNTING IN ACTION